

ELECTRONIC CASE FILING CM/ECF



User's Manual

Southern District of California
(Revised August 2006)

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Electronic Case Files System User's Manual

Getting Started

Introduction

This manual provides instructions on how to use the Electronic Filing System to file documents with the court, or to view and retrieve docket sheets and documents for all cases assigned to this system. Users should have a working knowledge of Internet Explorer or Netscape, and Adobe Acrobat.

Help Desk

Contact the Court's Help Desk between the hours of 8:30 A.M. and 4:30 P.M., Monday through Friday, if you need assistance using ECF.

Toll Free Help Desk **(866) 233-7983**

OR

E-mail: ecfhelp@casd.uscourts.gov

ECF System Capabilities

The electronic filing system allows registered participants with Internet accounts and Internet Explorer or Netscape software to perform the following functions:

- Open the Court's web page
- View or download the most recent version of the User's Manual
- Self-train on a web-based ECF Tutorial
- Practice entering pleadings into ECF using a "training" database that is similar to the official live ECF database
- Electronically file pleadings and documents in actual ("live") cases
- View official docket sheets and documents associated with cases
- View various reports for cases that were filed electronically

Requirements

Hardware and Software Requirements

The hardware and software needed to electronically file, view and retrieve case documents are the following:

- A personal computer running a standard platform such as Windows or Macintosh
 - An Internet provider using Point to Point Protocol (PPP)
 - Netscape Navigator software version 4.5, 4.7 or 4.76 and Internet Explorer 5.5, 6.0.2.
 - Software, such as Adobe Acrobat Writer or pdf995, to convert documents from a word processor format to portable document format (PDF).
 - A scanner to transmit documents that are not in your word processing system. **Note: This would only be used for documents that cannot be produced electronically. Scanned documents lessen the level of service we provide by slowing down the entire system. We are moving away from the utilization of scanned documents inside the Court and are asking you to do the same when possible.**
- * **DO NOT USE** America On-Line's version of Netscape Navigator, or a version of Netscape Navigator lower than 4.5.

PACER Registration

ECF users must have a PACER account with the Court in order to use the Query and Report features of the ECF system. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may call the PACER Service Center at (800) 676-6856 or (210) 301-6440 for information or to register for an account. Also, you may register for PACER online at <http://pacer.psc.uscourts.gov>.

Registering for Access to ECF

Participants will need to register with the court to receive a login and password for the CM/ECF system. Registration forms can be obtained on our web site at <http://www.casd.uscourts.gov> or by calling the court.

Completed registration forms should be mailed to:

United States District Court
Southern District of California
880 Front Street, Room 4290
San Diego, California, California 92101-8900
Attn: Attorney Admissions

Or faxed to: 619-557-5175

Once an account has been established, your login and password will be sent to the official Internet e-mail address that you provide on your registration form.

Registered users can visit a training version of the system on the Internet at <https://ecf-train.casd.uscourts.gov> to practice ECF activities. We strongly recommend that registered users practice in the “training” ECF database before filing documents in the “live” ECF database.

Preparation

Setting Up the Acrobat PDF Reader

Users must set up Adobe’s Acrobat Reader software in order to view documents that have been electronically filed on the system. All pleadings must be filed in PDF format. When installing this product, please review and follow Adobe’s directions to utilize Acrobat Reader after installation.

Portable Document Format (PDF)

Only PDF (Portable Document Format) documents may be filed with the court using the ECF system. Before sending the file to the court, users should preview the PDF formatted document to ensure that it appears in its entirety and in the proper format.

How to View a PDF File

- Start the Adobe Acrobat program.

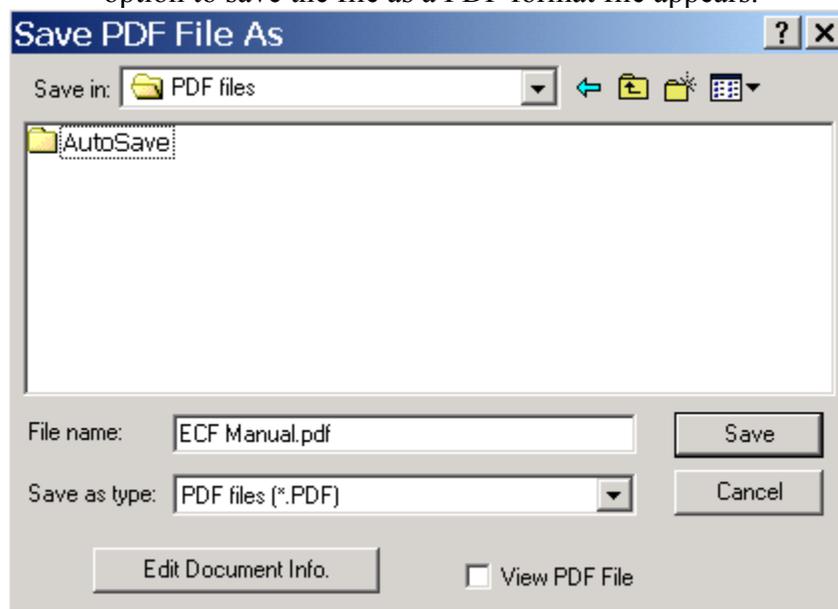
-
- Go to the *File* menu and choose *Open*.
 - Click on the location and file name of the document to be viewed.
 - If the designated location is correct, and the file is in PDF format, Adobe Acrobat loads the file and displays it on the screen.
 - If the displayed document is larger than the screen or consists of multiple pages, use the scroll bars to move through the document.
 - Click on the *View* menu for other options for viewing the displayed document. Choose the option that is most appropriate for the document.

How to Convert Documents to PDF Format

You must convert all of your documents to PDF format before submitting them to the Court's Electronic Case Filing (ECF) system. The conversion process requires special software such as Adobe Acrobat Writer, FinePrint pdfFactory, or pdf995. WordPerfect versions 9 and 10 have Acrobat Writer built-in and can also be used to convert documents to PDF.

Using any word processing program:

- Install Acrobat Writer or FinePrint pdfFactory on your computer
- Open the document to be converted
- Select the **[Print]** option (generally found in the File menu) and in the dialog box select the option to change the current printer. A drop down menu with a list of printer choices is displayed.
- Select **Adobe PDFWriter, FinePrint pdfFactory, or Publish to PDF** from within your word processing software.
- “Print” the file. The file should not actually print out; instead the option to save the file as a PDF format file appears.



- Make a note of the file location so you can find the document later when you are ready to upload it. Change the location if necessary by clicking in the “Save in” area of the window.
- Name the file, giving it the extension .PDF and click the **[Save]** button.

Depending on the word processing program being used, it may be necessary to find the printer selection option elsewhere. At that point, change the printer to Adobe PDFWriter, and follow the directions above.

**You must have either Adobe Acrobat Writer or FinePrint pdfFactory installed on your computer to see these choices listed.*

Basics

User Interactions

There are three general types of user interactions allowed by the system:

- Entering information in data fields
- Using command buttons to direct system activities
- Mouse-clicking on hyperlinks

Conventions used in this Manual:

- Data to be entered by the user is shown enclosed in angle brackets: <data to be entered>.
- Command buttons are represented in this manual in **[bracketed boldface type]**.
- Hyperlinks are represented in **underlined boldface type**.

Documents Filed In Error

A document incorrectly filed in a case may result from a) posting the wrong PDF file to a docket entry; b) selecting the wrong document type from the menu; or c) entering the wrong case number and not discovering the error before completing the transaction.

To request a correction, telephone:

Help Desk (866) 233-7983

as soon as possible after an error is discovered. You will need to provide the case and document numbers for the document requiring correction. If appropriate, the court will make an entry indicating that the document was filed in error. You will be advised if you need to re-file the document. The ECF system does not permit you to change the misfiled document(s) or incorrect docket entry after the transaction has been accepted.

Viewing Transaction Log

This feature, selected from the **Utilities** menu allows you to review all transactions ECF has processed with your login and password. If you believe or suspect someone is using your login and password without your permission, change your password immediately, then telephone the Court's Help Desk as soon as possible.

User's Manual

You can download or view the most recent version of the ECF User's Manual (in PDF format) from the District Court's web page. Enter <http://www.casd.uscourts.gov>, when the court's web page opens, click on the **CM/ECF** hyperlink.

A Step-By-Step Guide

Below is a step-by-step guide for entering the system, preparing a document for filing, filing a motion or application, and displaying a docket sheet. We suggest that you go through the steps on the training database before trying to actually file a document.

How to Access the System

Users may access the system via the Internet by going to <https://ecf.casd.uscourts.gov>

Or, you may go to the Southern District of California's Web site at www.casd.uscourts.gov and click on the **CM/ECF Website** hyperlink, then click on the **ECF Login** hyperlink.

Click on **Link to Electronic Filing System (Live Area)** to open the login screen and login to ECF. You may also access the courts **Training Database** by going to <https://ecf-train.casd.uscourts.gov>; or clicking on the **Link to Electronic Filing System (Training Area)** on our CM/ECF website.

Logging In

The next screen is the login screen.

ECF/PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

In the future an access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER account. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication

Login:

Password:

client code:

CM/ECF has been tested and works correctly with Netscape 4.6x and 4.7x.

Enter your ECF Login and Password in the appropriate data entry fields. All ECF login names and passwords are case sensitive.

Note: Use your **ECF** login and password if you are entering the system to file a pleading or to maintain your account. If you only wish to enter ECF to query the database for case information or to view a document, enter your **PACER** login and password. Beginning September 2003 you will be charged a fee to view ECF case dockets and documents.

Verify that you have entered your ECF login and password correctly. If not, click on the **[Clear]** button to erase the Login and Password entries and re-enter the correct information. After you enter the correct login and password information, click on the **[Login]** button to transmit your user information to the ECF system.

- If the ECF system does not recognize your login and password, it will display the following error message on a new screen.

Login failed either your login name or key is incorrect



- Click on the **[Back]** button in your browser and re-enter your correct login and password.

Once the **Main Menu** appears, choose from a list of **hyperlinked** options on the top bar.



Note: The date *you last logged into the system* appears at the bottom left corner of this screen. You should review this information each time you login for security reasons. If you believe your last login date and time are incorrect, or suspect an unauthorized party is using your login and password, please telephone the court's Help Desk as soon as possible.

Selecting ECF Features

ECF provides the following features that are accessible from the Blue menu bar at the top of the opening screen.

- Civil-** Select **Civil** to electronically file all civil case pleadings, motions, and other court documents.
- Criminal-** Select Criminal to electronically file all criminal case pleadings, motions, and
- Query-** Query ECF by specific case number, party name, or nature of suit to retrieve documents that are relevant to the case. You must login to **PACER** before you can query ECF.
- Reports-** Choose **Reports** to retrieve docket sheets and cases-filed reports. You must login to **PACER** before you can view an ECF report.
- Utilities-** View your personal ECF transaction log and maintain personal ECF account information in the **Utilities** area of ECF.

Logout- Allows you to exit from ECF and prevents further filing with your password until the next time you log in.

Civil Events Feature

Registered filers will use the Civil feature of ECF to electronically self-file and docket with the Court a variety of pleadings and other documents for civil cases. See the list of ECF documents at the back of this manual. This section of the manual describes the basic steps that you need to take in order to file a single motion with the Court. The process is consistent regardless of the event.

General Rules and Manipulations

Manipulating the screens

Each screen has the following two buttons:

-  clears **all** characters entered in the box(es) on that screen.
-  or  accepts the entry just made and displays the next entry screen, if any.

Correcting a mistake:



Use the  button on the browser toolbar to go back and correct an entry made on a previous screen. However, once the document is transmitted to the court, only the court can make changes or corrections.

Signatures; Affidavits of Service

Documents which must contain original signatures or which require either verification or an unsworn declaration under any rule or statute, shall be filed electronically with originally executed copies maintained by the filer. The pleadings or other documents electronically filed shall indicate a signature, e.g., “s/Jane Doe.”

In the case of a stipulation or other document to be signed by two or more persons, the following procedure should be used:

Documents requiring signatures of more than one party shall be filed either by submitting a scanned document containing all necessary signatures; by representing the consent of the other parties on the document; or by filing the document identifying the parties whose signatures are required. Parties shall have one business day to file an Objection to Electronic Filing if they object to contents of the document that contains their signature. The filing party or attorney shall retain the hardcopy of the document containing the original signatures for five (5) years after final resolution of the action, including final disposition of all appeals.

Filing Documents for Civil Cases

There are eight basic steps involved in filing a document:

- 1) Select the type of document to file (see Attorney Event Menu);
- 2) Enter the case number in which the document is to be filed;
- 3) Designate the attorney(s) filing the document;
- 4) Designate the party(s) filing the document;
- 5) Specify the PDF file name and location for the document to be filed.
- 6) Add attachments, if any, to the document being filed.
- 7) Modify docket text as necessary
- 8) Submit the pleading to ECF
- 9) Receive notification of electronic filing

After successfully logging into ECF, follow these steps to file a pleading.



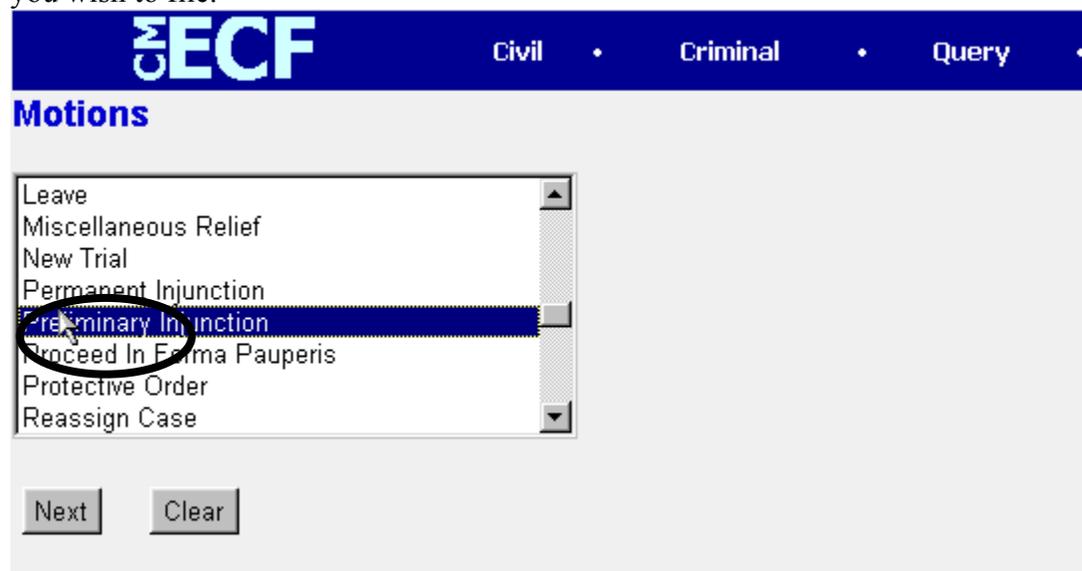
1. Select the type of document to file

Select **Civil** from the blue menu bar at the top of the ECF screen. The Civil Event window opens displaying all of the events from which you may choose for your filing. This section of the User's Manual describes the process for filing a **Motion** in ECF. The process is similar for filing other pleadings in ECF.

Click on **Motions**, under **Motions and Related Filings**



The **Motions** screen appears and displays a motion selection field with a scroll bar next to it. Scroll through the menu until you find the type of motion or application you wish to file.

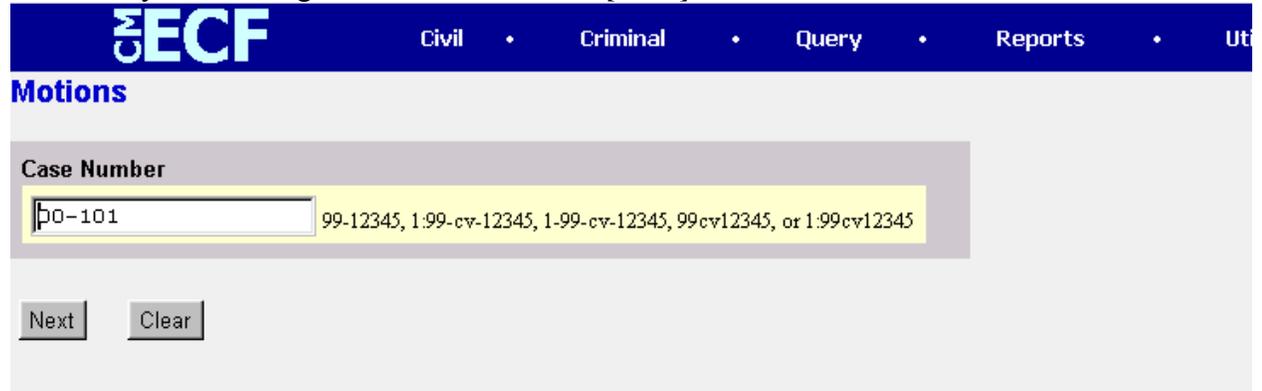


For demonstration purposes, highlight **Preliminary Injunction** and click on [Next].

Note: To select more than one motion, press and hold down the **Ctrl** key, and click on each of the desired multiple forms of relief.

2. Enter the case number in which the document is to be filed.

A new Motions screen opens with a Case Number field. Enter the number of the case for which you are filing a motion and click on **[Next]**.



The screenshot shows the ECF Motions interface. At the top is a blue navigation bar with the ECF logo and links for Civil, Criminal, Query, Reports, and Ut. Below the bar, the word "Motions" is displayed in blue. A light gray box contains the "Case Number" field, which has a text input box containing "00-101" and a dropdown menu with options: "99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345". Below the input box are two buttons: "Next" and "Clear".

- If the number is entered incorrectly, click **Clear** to re-enter. If the computer prompts that you entered an invalid case number, click on **Back** to re-enter.

- When the case number is correct, click on **Next**.

3. Designate the party(s) filing the document



The screenshot shows the ECF Motions interface for case "8:00-cv-00101 Solich v. Stoops". Below the case name, there is a blue instruction: "If the name of the filer does not appear below click on Add/Create New Party." Underneath, the text "Select the Party:" is followed by a dropdown menu. The dropdown menu is open, showing two options: "Frank Solich [Plaintiff]" and "Bob Stoops [Defendant]". To the right of the dropdown is a blue link: "Add/Create New Party". At the bottom of the screen are two buttons: "Next" and "Clear". A mouse cursor is visible over the "Clear" button.

Highlight the name of the party or parties for whom you are filing the motion. If you represent all defendants or all plaintiffs you may select the entire group by holding down

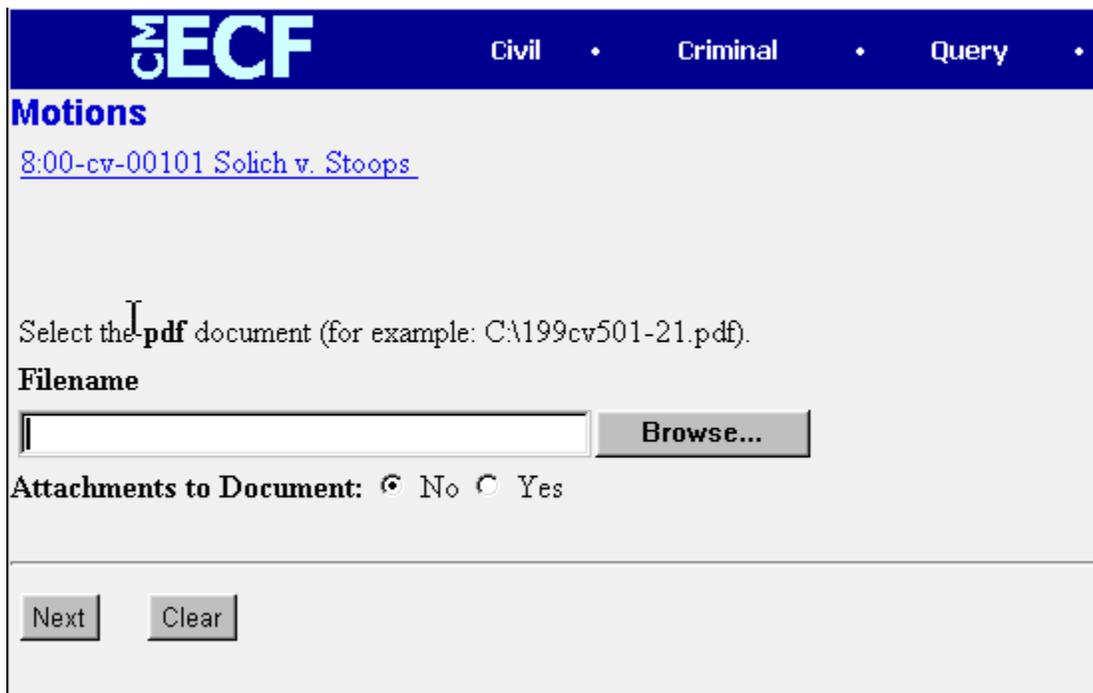
the control key while pointing and clicking on each party of the group
After highlighting the parties to the motion, click on the **[Next]** button.

Note: If your party does not appear, see the section of this manual titled **Add/Create New Party**.

4. Specify the PDF file name and location for the document to be filed.

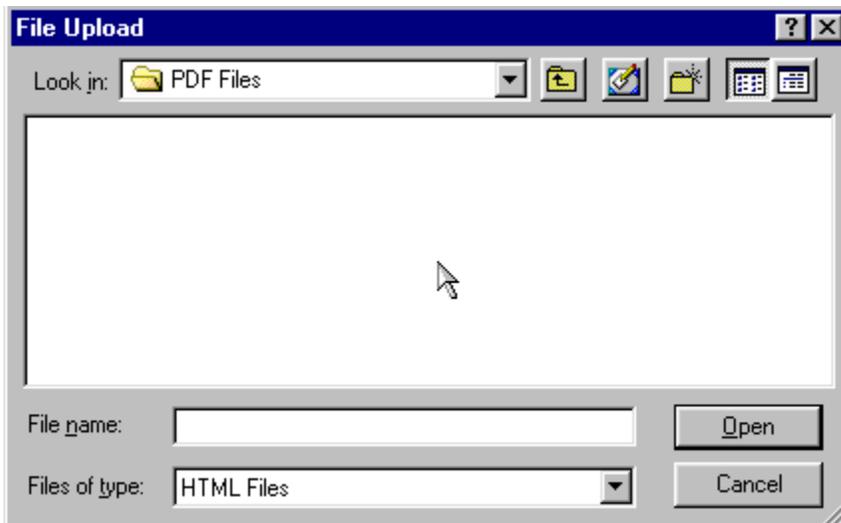
ECF accepts the party or parties you selected and refreshes the screen to display a new **Motions** screen depicted below. ECF displays a field for locating and entering the PDF file of the document (pleading) you are filing in ECF.

Note: It is imperative that you attach an electronic copy of the actual pleading when prompted by the system. All documents that you intend to file in ECF **MUST** reside in **PDF** format. Otherwise, ECF will not accept the document and users will be unable to retrieve and read your document from within ECF.



The screenshot shows the ECF interface. At the top is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header is the 'Motions' section, which includes a link for '8:00-cv-00101 Solich v. Stoops'. The main area contains a prompt: 'Select the pdf document (for example: CA199cv501-21.pdf)'. Below this is a 'Filename' label, an empty text input field, and a 'Browse...' button. At the bottom of the form, there is a radio button selection for 'Attachments to Document' with 'No' selected and 'Yes' as an option. At the very bottom of the screen are 'Next' and 'Clear' buttons.

- Click on the **[Browse]** button. ECF opens the following screen.



- Change the **Files of type** from:



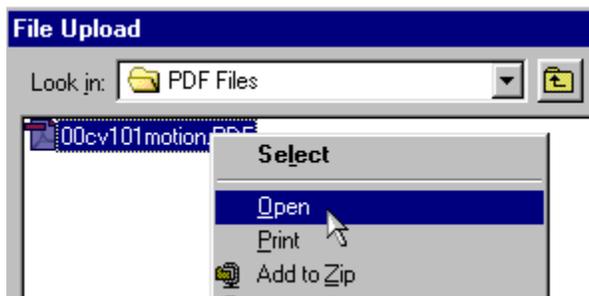
to:



- Navigate to the appropriate directory and file name to select the PDF document you wish to file.

- Highlight the file to upload to ECF.

Note: In order to verify that you have selected the correct document, right mouse click on the highlighted file name to open a **quick menu** and left mouse click on **[open]**. Adobe Acrobat or Acrobat Reader will launch and open the PDF document that you selected. You should view it to verify that it is the correct document.



- Once you have verified the document is correct, close Adobe Acrobat and click on the **[Open]** button. ECF closes the **File Upload** screen and inserts the PDF file name and location in the **Motions** screen.

CM/ECF Civil • Criminal • Query

Motions

[8:00-cv-00101 Solich v. Stoops](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename

C:\My Documents\PDF Files\00cv101mo

Attachments to Document: No Yes

- If there are no attachments to the motion, click on **[Next]**. A new **Motions** window opens. Go to Section 6, “**Modifying Docket Text**,” to proceed with your filing.
- If you have Attachments to your motion, you will select **[Yes]** on the screen depicted above. Click on **[Next]** and proceed to the first step in Section 5, “**Adding Attachments to Documents Being Filed**”.

In the event you selected and highlighted a file that is *not* in PDF format, ECF will display the following error message after you click on the **[Next]** button.

CM/ECF Civil • Query • Reports • Utilities

Motions

[1-01-04011-PLF DE/MITRIA RICE et al v. ARLENE ACKERMAN et al](#)

ERROR: Document is not a well-formed PDF document (no further information is available).

- ECF will not permit you to select a file for your pleading that is not in PDF format.
- Click on the **[Back]** button and ECF will return to the **Motions** screen. Select and highlight the PDF file of your pleading and proceed as before.

Failure to Select A Document to File

If you fail to select a document to file with your pleading, ECF will display the error

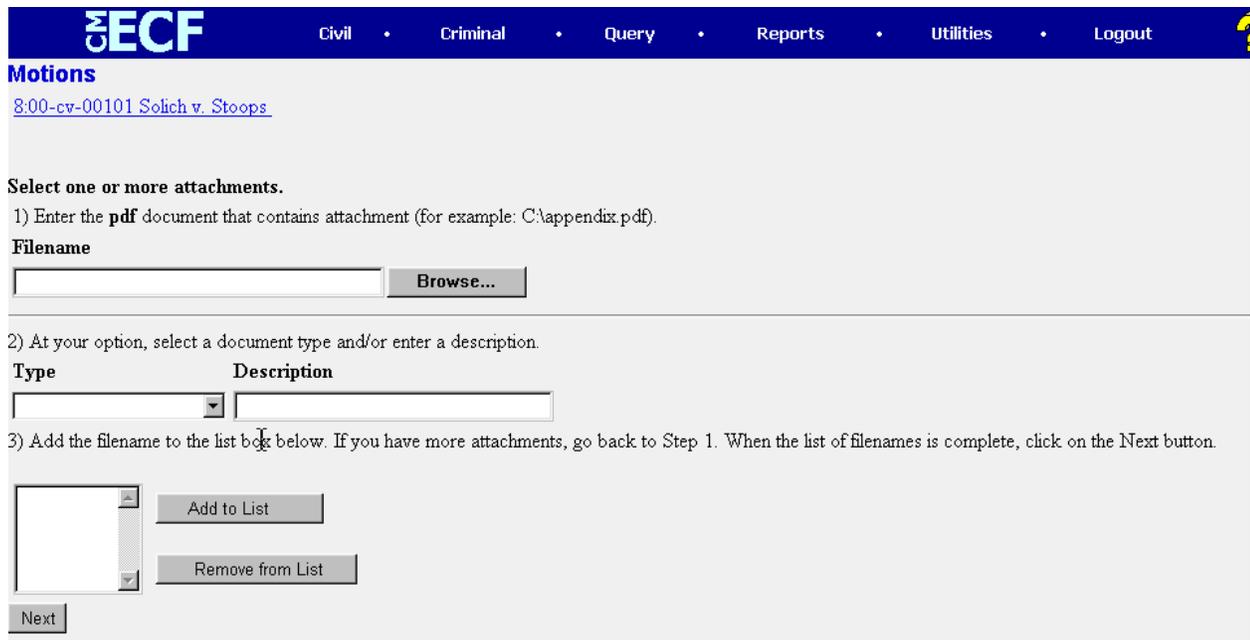
message depicted below.



- If you click **[OK]** from the screen depicted above ECF will return you to the **Motions** screen. You cannot proceed without attaching a PDF document.

5. Add attachments to documents being filed

If you acknowledged the need to attach documents to your motion during the previous step, a new **Motions** screen appears.



- Click on **[Browse]** to search for the document file name of the attachment.
- Next to the field for attachment **Type**, click on the arrow and ECF opens a pulldown screen. Highlight the type of attachment from the displayed selection.
- To describe the attachment more fully, click in the **Description** box and type a clear and concise description of the attachment.
- Click on **[Add to List]**.

ECF adds the selected document as an attachment to the pleading. A new **Motions** screen opens to display the file name of the newly attached document.

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

C:\My Documents\reclassify_guidelin Browse...

2) At your option, select a document type and/or enter a description.

Type **Description**

Appendix

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

C:\My Documents\reclassify_guideline_wo_summons.pdf Add to List

Remove from List

Next

- Repeat the sequence for each additional attachment.
- After adding all of the desired PDF documents as attachments, click on [Next].

When attachments and exhibits are in paper format

Attachments and exhibits that cannot be created and filed electronically and when scanned are greater than 10MB in size, can be submitted in paper format. Present the entire pleading with attachments to the clerk's office for handling.

Note: For moderate length paper attachments, consider dividing them into two or more smaller attachments, scanning, and filing them electronically.

6. Modify docket text

Civil • Criminal • Query • Reports • Utilities •

ECF

Motions

[8:00-cv-00101 Solich v. Stoops](#)

Docket Text: Modify as Appropriate.

Dropdown menu: [Blue highlight]

MOTION for Preliminary Injunction [Text box] on behalf of Plaintiff Frank Solich (attorney2,)

Next Clear

Click on the button shown here to open a modifier drop-down list. Select a modifier if appropriate.

ECF Civil • Criminal • Query • Reports • Utilities

Motions
[8:00-cv-00101 Solich v. Stoops](#)

Docket Text: Modify as Appropriate.

MOTION for Preliminary Injunction on behalf of Plaintiff Frank
 Solich (attorney2,)

First
 Second
 Third
 Fourth
 Fifth
 Sixth
 Seventh
 Eighth
 Ninth
 Tenth
 Amended
 Consent
 Counter
 Cross
 Emergency
 Endorsed
 Ex Parte
 Final
 Interim

Click in the open text area to type additional text for the description of the pleading.

ECF Civil • Criminal • Query • Reports • Utilities

Motions
[8:00-cv-00101 Solich v. Stoops](#)

Docket Text: Modify as Appropriate.

MOTION for Preliminary Injunction to cease and desist from on behalf of Plaintiff Frank
 Solich (attorney2,)

7. Submit the pleading.

- Click on the [Next] button. A new **Motions** window appears with the complete text for the docket report.
- Review the docket text and correct any errors. If you need to modify data on a previous screen, click the  button on the browser toolbar to find the screen you wish to alter.

CM/ECF Civil • Criminal • Query • Reports • Utilities •

Motions
[8:00-cv-00101 Solich v. Stoops](#)

Docket Text: Final Text

Third MOTION for Preliminary Injunction to cease and desist by Attorney Bobby Donnell on behalf of Plaintiff Frank Solich (Pleiss, Luta)

Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

- Click on the **[Next]** button to file and docket the pleading.

Note: The screen depicted above contains the following warning.

Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

At any time prior to this step, you can abort the ECF filing or return to previous screens by:

- clicking on any hyperlink on the **Blue** ECF menu bar *to abort* the current transaction. ECF will reset to the beginning of the process you just selected.
- clicking on the Web Browser **[Back]** button until *you return to the desired screen*.

8. Notice of Electronic Filing

ECF opens a new **Motions** window displaying an ECF filing receipt.

The screenshot shows the ECF Motions window. At the top is a blue navigation bar with the ECF logo and links for Civil, Criminal, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "Motions" and the case name is "8:00-cv-00101 Solich v. Stoops". The main content area displays a "Notice of Electronic Filing" for the case. It states that a transaction was received from Bobby Donnell on 2/7/2002 at 8:22 PM CST. The case name is Solich v. Stoops, the case number is 8:00-cv-00101, and the document number is 2. The docket text reads: "Third MOTION for Preliminary Injunction to cease and desist by Attorney Bobby Donnell on behalf of Plaintiff Frank Solich (Pleiss, Luta)". Below this, it lists associated documents, including a main document with the original filename "C:/WINDOWS/Desktop/CofC.pdf" and an electronic document stamp with a long alphanumeric ID. At the bottom, it lists the filer's name, Bobby Donnell, and the law firm, DONNELL, YOUNG LAW FIRM, located at 72 Beacon Street, Boston, MA 02108.

- The screen depicted above provides confirmation that ECF has registered your transaction and the pleading is now an official court document. It also displays the date and time of your transaction and the number that was assigned to your document. You should note this number on the document's PDF file.
- Select **[Print]** on the browser toolbar to print the document receipt.
- Select **[File]** on the browser menu bar, and choose **Save Frame As...** from the drop-down window to save the receipt to a file on the hard drive of your computer.

Note: The **Notice of Electronic Filing** represents your confirmation of filing. The Court strongly urges you to copy it to a file on your computer hard-drive, print it, and retain a hard copy in your personal files.

- ECF will electronically transmit the **Notice of Electronic Filing** to the attorneys and parties to the case who have supplied their E-mail addresses to the Court. The ECF filing report also displays the names and addresses of individuals who will **not** be electronically notified of the filing. It is the filer's responsibility to serve hard copies of the pleading and the Notice of Electronic Filing to attorneys and parties who are not set up for electronic notification.

E-Mail Notification of Documents That Were Filed

After a pleading is electronically filed, the ECF System sends a **Notice of Electronic Filing** to the designated attorneys and parties who have supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the **Notice of Electronic Filing**. The filer is permitted one free look at the document *and* the Docket Sheet to verify that the pleading was properly docketed. The Court strongly urges you to copy the **Notice of Electronic Filing** *and* pleading documents to your hard-drive for future access. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

<p>Note: It is the responsibility of filers to send hard copies of the pleading and Notice of Electronic Filing to attorneys and pro se parties who have indicated they <i>do not</i> have E-mail accounts.</p>

Criminal Events Feature

Filing Documents for Criminal Cases

There are nine basic steps involved in filing a criminal document:

- 1) Select the type of document to file (see Attorney Event Menu);
- 2) Enter the case number in which the document is to be filed;
- 3) Designate the defendant that the filing relates to;
- 4) Verify that the case number and caption are correct.
- 5) Designate the party(s) filing the document;
- 6) Specify the PDF file name and location for the document to be filed.
- 7) Add attachments, if any, to the document being filed.
- 8) Modify docket text as necessary
- 9) Submit the pleading to ECF
- 10) Receive notification of electronic filing

After successfully logging into ECF, follow these steps to file a pleading.



1. Select the type of document to file

Select **Criminal** from the blue menu bar at the top of the ECF screen. The Criminal Event window opens displaying all of the events from which you may choose for your filing. This section of the User's Manual describes the process for filing a **Motion** in ECF. The process is similar for filing other pleadings in ECF.

Click on **Motions**, under **Motions and Related Filings**



The **Motions** screen appears and displays a motion selection field with a scroll bar next to it. Scroll through the menu until you find the type of motion or application you wish to file.



For demonstration purposes, highlight **Suppress** and click on [Next].

Note: To select more than one motion, press and hold down the **Ctrl** key, and click on each of the desired multiple forms of relief.

2. Enter the case number in which the document is to be filed.

A new Motions screen opens with a Case Number field. Enter the number of the case for which you are filing a motion and click on **[Next]**.

The screenshot shows the ECF Motions interface. At the top, there is a blue header with the ECF logo and navigation links for Civil, Criminal, and Query. Below the header, the word "Motions" is displayed in blue. The main content area has a light gray background. A section titled "Case Number" contains a text input field with "02-100" entered. To the right of the input field, a list of accepted case number formats is shown: "99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345". Below the input field are two buttons: "Next" and "Clear".

Note: if the case number you are working on is 8:00cr101, you could enter the case number in any of the following formats:

02-100

02cr100

8:02-cr-100

8-02-cr-100

8:02cr100

- If the number is entered incorrectly, click **[Clear]** to re-enter. If the computer prompts that you entered an invalid case number, click on **[Back]** to re-enter.
- When the case number is correct, click on **[Next]**

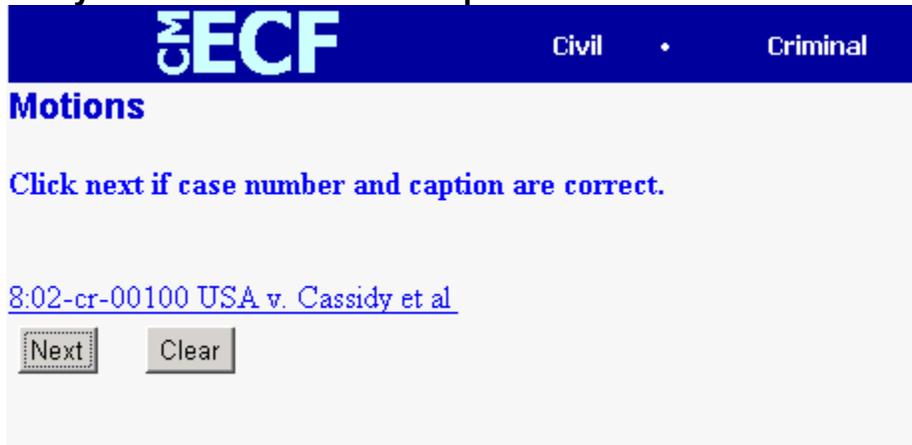
3. Designate the defendant(s) that the filing relates to.

The screenshot shows the ECF Motions interface. At the top, there is a blue header with the ECF logo and navigation links for Civil and Criminal. Below the header, the word "Motions" is displayed in blue. The main content area has a light gray background. A section titled "Select defendants" contains a list of checkboxes. The first two are "8-02-cr-100-1 - Butch Cassidy" and "8-02-cr-100-2 - Sundance Kid", both with unchecked boxes. The third is "All defendants" with a checked box. Below the list are two buttons: "Next" and "Clear".

Click in the boxes to place a check next to each defendant's name that this filing

relates to. If it relates to all defendants in the case, check the box for “All Defendants” and leave the other boxes unchecked. When finished selecting defendants click on [Next].

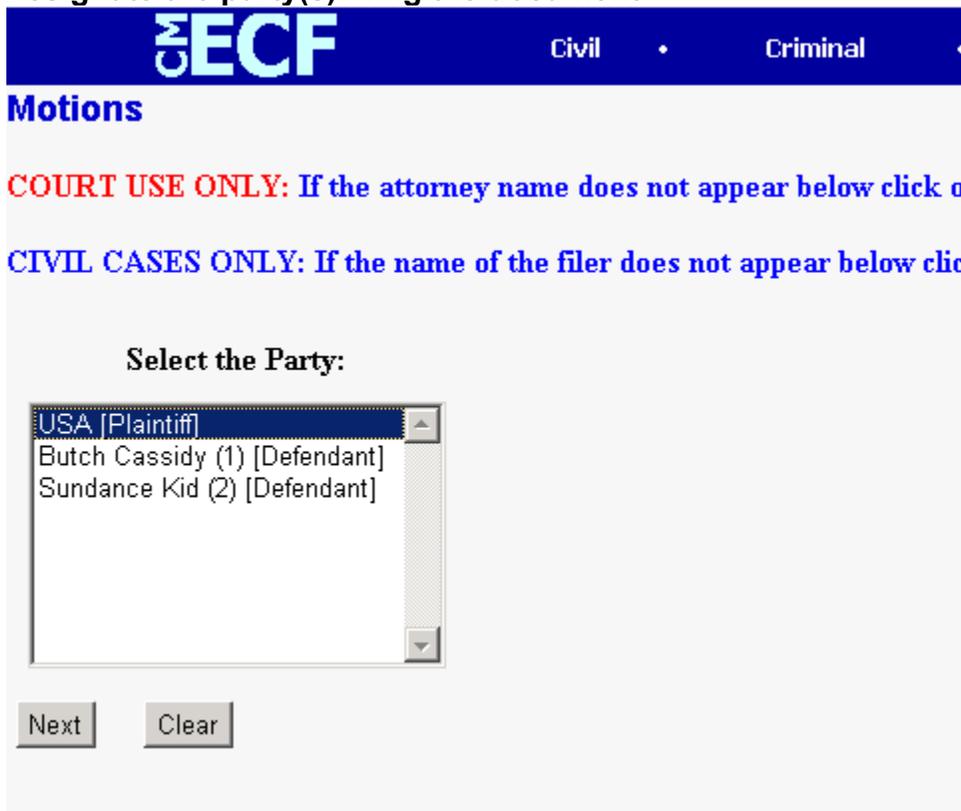
4. Verify the case number and caption are correct.



The screenshot shows the ECF Motions interface. At the top, there is a blue header with the ECF logo and navigation tabs for "Civil" and "Criminal". Below the header, the word "Motions" is displayed in blue. A blue instruction reads: "Click next if case number and caption are correct." Below this, the case number and caption "8:02-cr-00100 USA v. Cassidy et al" are shown in blue. At the bottom of the interface, there are two buttons: "Next" and "Clear".

Click 

5. Designate the party(s) filing the document



The screenshot shows the ECF Motions interface for designating the party. At the top, there is a blue header with the ECF logo and navigation tabs for "Civil" and "Criminal". Below the header, the word "Motions" is displayed in blue. Two red instructions are present: "COURT USE ONLY: If the attorney name does not appear below click on" and "CIVIL CASES ONLY: If the name of the filer does not appear below click". Below these instructions, the text "Select the Party:" is displayed. A scrollable list box contains three options: "USA [Plaintiff]", "Butch Cassidy (1) [Defendant]", and "Sundance Kid (2) [Defendant]". At the bottom of the interface, there are two buttons: "Next" and "Clear".

Highlight the name of the party or parties filing the motion. Click on the [Next] button.

6. Specify the PDF file name and location for the document to be filed.

ECF accepts the party or parties you selected and refreshes the screen to display a new **Motions** screen depicted below. ECF displays a field for locating and entering the PDF file of the document (pleading) you are filing in ECF.

Note: It is imperative that you attach an electronic copy of the actual pleading when prompted by the system. All documents that you intend to file in ECF **MUST** reside in **PDF** format. Otherwise, ECF will not accept the document and users will be unable to retrieve and read your document from within ECF.

ECF Civil • Criminal •

Motions

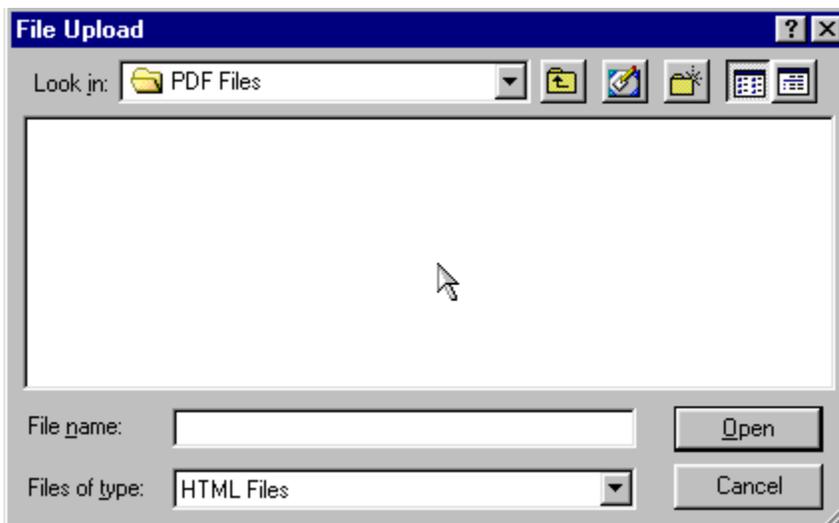
[8:02-cr-00100 USA v. Cassidy et al](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename

Attachments to Document: No Yes

- Click on the [**Browse**] button. ECF opens the following screen.



- Change the **Files of type** from:

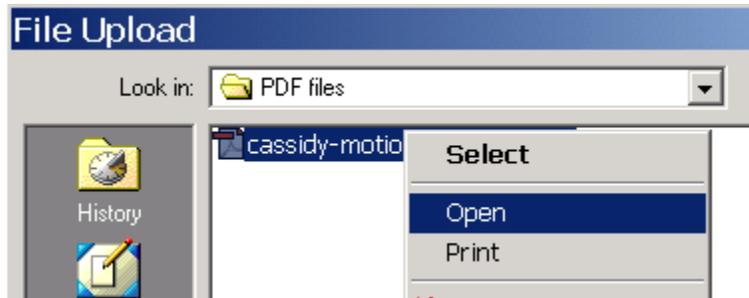
Files of type:

to:



- Navigate to the appropriate directory and file name to select the PDF document you wish to file.
- Highlight the file to upload to ECF.

Note: In order to verify that you have selected the correct document, right mouse click on the highlighted file name to open a **quick menu** and left mouse click on **[open]**. Adobe Acrobat or Acrobat Reader will launch and open the PDF document that you selected. You should view it to verify that it is the correct document.



- Once you have verified the document is correct, close Adobe Acrobat and click on the **[Open]** button in the lower right corner of the File Upload window. ECF closes the **File Upload** screen and inserts the PDF file name and location in the **Motions** screen.

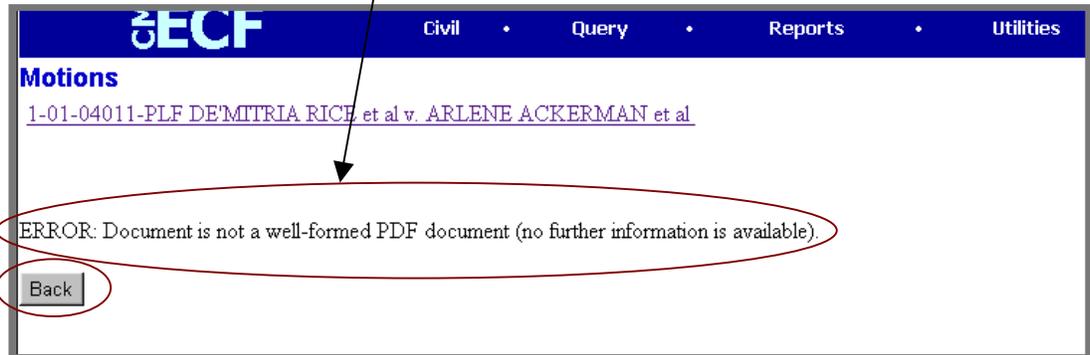
A screenshot of the ECF Motions screen. The header shows 'ECF' and navigation links for 'Civil', 'Criminal', and 'Query'. The main heading is 'Motions'. Below it, the case name '8:02-cr-00100 USA v. Cassidy et al' is displayed. A text prompt asks to 'Select the pdf document (for example: C:\199cv501-21.pdf)'. The 'Filename' field contains 'C:\My Documents\PDF files\cassidy-m' and a 'Browse...' button is next to it. Below the filename field, there is a section for 'Attachments to Document' with radio buttons for 'No' (selected) and 'Yes'. At the bottom, there are 'Next' and 'Clear' buttons.

- If there are no attachments to the motion, click on **[Next]**. A new **Motions**

window opens. Go to Section 6, “**Modifying Docket Text,**” to proceed with your filing.

- If you have Attachments to your motion, you will select [Yes] on the screen depicted above. Click on [Next] and proceed to the first step in Section 5, “**Adding Attachments to Documents Being Filed**”.

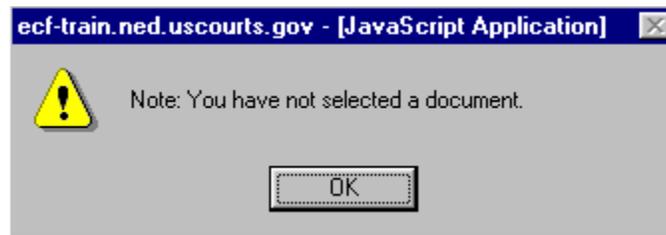
In the event you selected and highlighted a file that is *not* in PDF format, ECF will display the following error message after you click on the [Next] button.



- ECF will not permit you to select a file for your pleading that is not in PDF format.
- Click on the [Back] button and ECF will return to the **Motions** screen. Select and highlight the PDF file of your pleading and proceed as before.

Failure to Select A Document to File

If you fail to select a document to file with your pleading, ECF will display the error message depicted below.



- If you click [OK] from the screen depicted above ECF will return you to the **Motions** screen. You cannot proceed without attaching a PDF document.

7. Add attachments to documents being filed

If you acknowledged the need to attach documents to your motion during the previous step, a new **Motions** screen appears.

Motions

[8:00-cv-00101 Solich v. Stoops](#)

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

2) At your option, select a document type and/or enter a description.

Type	Description
<input type="text"/>	<input type="text"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

<input type="text"/>	<input type="button" value="Add to List"/>
<input type="text"/>	<input type="button" value="Remove from List"/>
<input type="button" value="Next"/>	

- Click on [**Browse**] to search for the document file name of the attachment.
- Next to the field for attachment **Type**, click on the arrow and ECF opens a pulldown screen. Highlight the type of attachment from the displayed selection.
- To describe the attachment more fully, click in the **Description** box and type a clear and concise description of the attachment.
- Click on [**Add to List**].

ECF adds the selected document as an attachment to the pleading. A new **Motions** screen opens to display the file name of the newly attached document.

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

C:\My Documents\reclassify_guidelin

2) At your option, select a document type and/or enter a description.

Type	Description
Appendix	<input type="text"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

C:\My Documents\reclassify_guideline_wo_summons.pdf	<input type="button" value="Add to List"/>
<input type="text"/>	<input type="button" value="Remove from List"/>
<input type="button" value="Next"/>	

- Repeat the sequence for each additional attachment.
- After adding all of the desired PDF documents as attachments, click on [**Next**].

When attachments and exhibits are in paper format

Attachments and exhibits that cannot be created and filed electronically and when scanned are greater than 10MB in size, can be submitted in paper format. Present the

entire pleading with attachments to the clerk's office for handling.

Note: For moderate length paper attachments, consider dividing them into two or more smaller attachments, scanning, and filing them electronically.

8. Modify docket text

The screenshot shows the ECF Motions interface. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', and 'Utilities'. Below this, the 'Motions' section is active, showing the case '8:02-cr-00100 USA v. Cassidy et al'. The 'Docket Text: Modify as Appropriate.' section contains a text area with the text 'MOTION to Suppress' followed by a text box and 'by Attorney Luta K. Pleiss as to defendant(s) Butch Cassidy, Sundance Kid. (Pleiss, Luta)'. A dropdown menu is open, showing options: Amended, Ex Parte, Final, Interim, Joint, and Supplemental. An arrow points to the dropdown menu.

Click on the button shown here to open a modifier drop-down list. Select a modifier if appropriate.

The screenshot shows the ECF Motions interface. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', and 'Utilities'. Below this, the 'Motions' section is active, showing the case '8:02-cr-00100 USA v. Cassidy et al'. The 'Docket Text: Modify as Appropriate.' section contains a text area with the text 'MOTION to Suppress' followed by a text box and 'by Attorney Luta K. Pleiss as to defendant(s) Butch Cassidy, Sundance Kid. (Pleiss, Luta)'. A dropdown menu is open, showing options: Amended, Ex Parte, Final, Interim, Joint, and Supplemental. An arrow points to the dropdown menu.

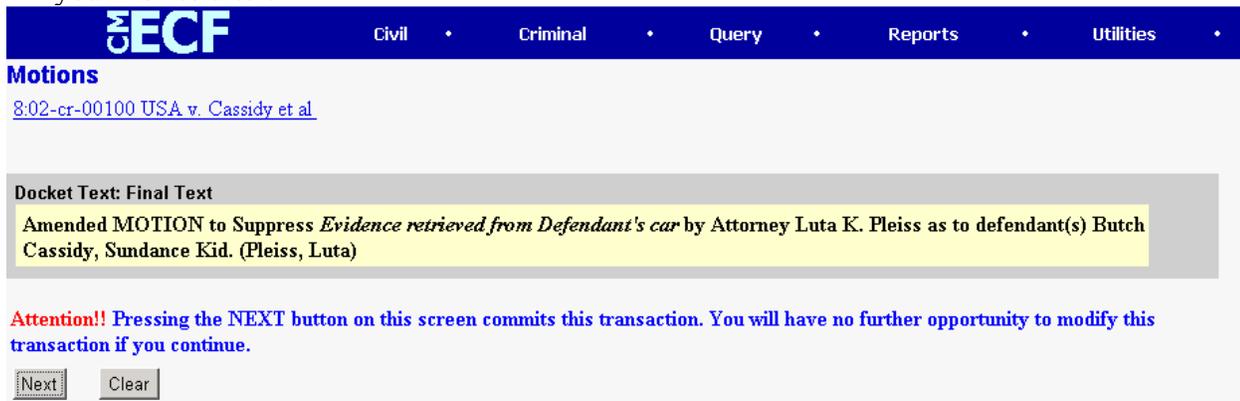
Click in the open text area to type additional text for the description of the pleading.

The screenshot shows the ECF Motions interface. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', and 'Utilities'. Below this, the 'Motions' section is active, showing the case '8:02-cr-00100 USA v. Cassidy et al'. The 'Docket Text: Modify as Appropriate.' section contains a text area with the text 'MOTION to Suppress' followed by a text box containing 'Evidence retrieved from D' and 'by Attorney Luta K. Pleiss as to defendant(s) Butch Cassidy, Sundance Kid. (Pleiss, Luta)'. A dropdown menu is open, showing options: Amended, Ex Parte, Final, Interim, Joint, and Supplemental. An arrow points to the dropdown menu.

9. Submit the pleading.

- Click on the [Next] button. A new **Motions** window appears with the complete text for the docket report.

- Review the docket text and correct any errors. If you need to modify data on a previous screen, click the  button on the browser toolbar to find the screen you wish to alter.



ECF Civil • Criminal • Query • Reports • Utilities •

Motions

[8:02-cr-00100 USA v. Cassidy et al](#)

Docket Text: Final Text

Amended MOTION to Suppress *Evidence retrieved from Defendant's car* by Attorney Luta K. Pleiss as to defendant(s) Butch Cassidy, Sundance Kid. (Pleiss, Luta)

Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

- Click on the [Next] button to file and docket the pleading.

Note: The screen depicted above contains the following warning.

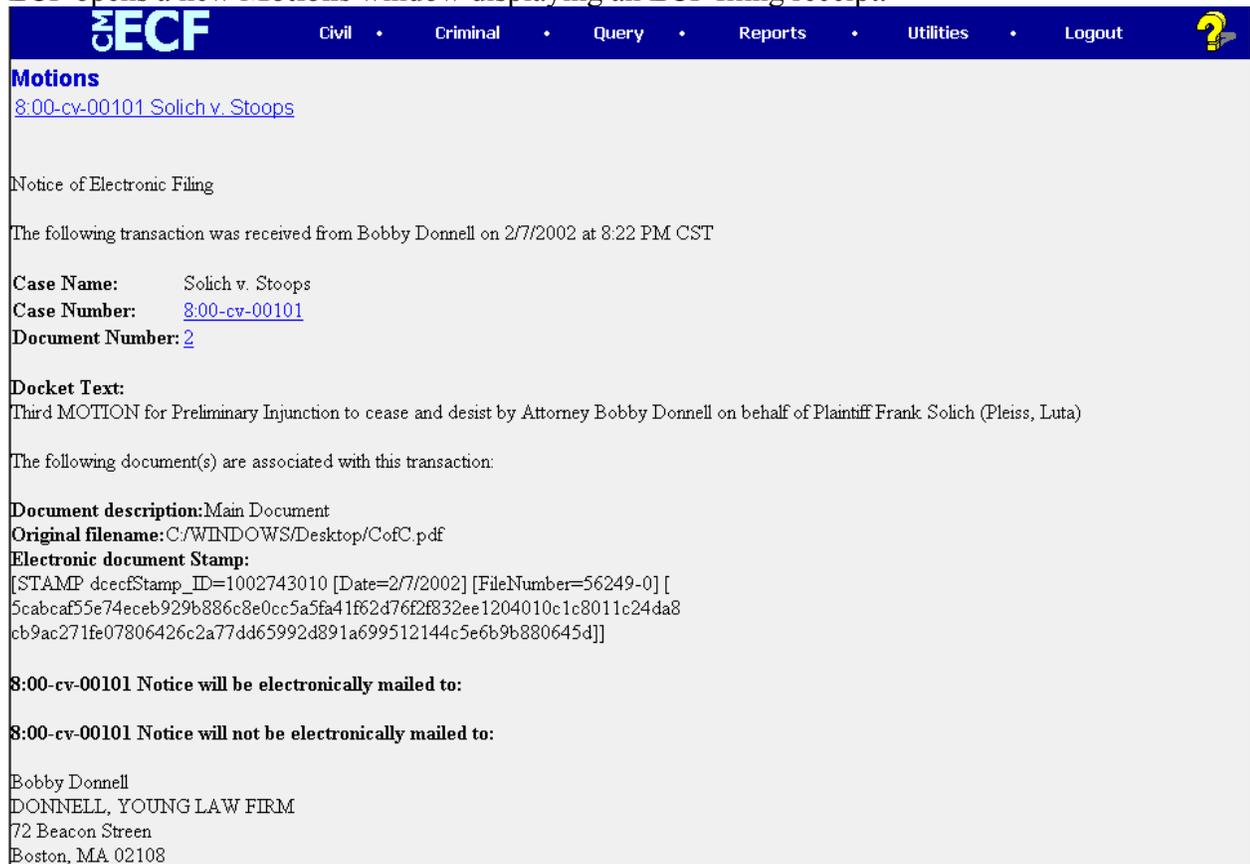
Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

At any time prior to this step, you can abort the ECF filing or return to previous screens by:

- clicking on any hyperlink on the **Blue** ECF menu bar *to abort* the current transaction. ECF will reset to the beginning of the process you just selected.
- clicking on the Web Browser **[Back]** button until *you return to the desired screen.*

10. Notice of Electronic Filing

ECF opens a new **Motions** window displaying an ECF filing receipt.



The screenshot shows the ECF Motions window. At the top is a navigation bar with links for Civil, Criminal, Query, Reports, Utilities, and Logout, along with a question mark icon. Below the navigation bar, the page title is "Motions" and the case name is "8:00-cv-00101 Solich v. Stoops". The main content area displays a "Notice of Electronic Filing" for the case. It states that a transaction was received from Bobby Donnell on 2/7/2002 at 8:22 PM CST. The case name is "Solich v. Stoops", the case number is "8:00-cv-00101", and the document number is "2". The docket text reads: "Third MOTION for Preliminary Injunction to cease and desist by Attorney Bobby Donnell on behalf of Plaintiff Frank Solich (Pleiss, Luta)". Below this, it lists associated documents, including a main document with the original filename "C:/WINDOWS/Desktop/CofC.pdf" and an electronic document stamp with a long alphanumeric ID. At the bottom, it lists the filer's name and address: Bobby Donnell, DONNELL, YOUNG LAW FIRM, 72 Beacon Street, Boston, MA 02108.

- The screen depicted above provides confirmation that ECF has registered your transaction and the pleading is now an official court document. It also displays the date and time of your transaction and the number that was assigned to your document. You should note this number on the document's PDF file.
- Select **[Print]** on the browser Toolbar to print the document receipt.
- Select **[File]** on the browser menu bar, and choose **Save Frame As...** from the drop-down window to save the receipt to a file on the hard drive of your computer.

Note: The **Notice of Electronic Filing** represents your Certificate of Service. The Court strongly urges you to copy it to a file on your computer hard-drive, print it, and retain a hard copy in your personal files.

- ECF will electronically transmit the **Notice of Electronic Filing** to the attorneys and parties to the case who have supplied their E-mail addresses to the Court. The ECF filing report also displays the names and addresses of individuals who will **not** be electronically notified of the filing. It is the filer's responsibility to serve hard copies of the pleading and the Notice of Electronic Filing to attorneys and parties who are not set up for electronic notification.

E-Mail Notification of Documents That Were Filed

After a pleading is electronically filed, the ECF System sends a **Notice of Electronic Filing** to the designated attorneys and parties who have supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the **Notice of Electronic Filing**. The filer is permitted one free look at the document. The Court strongly urges you to copy the **Notice of Electronic Filing** and pleading documents to your hard-drive for future access. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

Note: It is the responsibility of filers to send hard copies of the pleading and **Notice of Electronic Filing** to attorneys and pro se parties who have indicated they *do not* have E-mail accounts.

Add/Create a New Party

In rare cases you may need to add a party to the ECF system. If the party you represent is not listed in the "Select a Party" screen, click on **Add/Create New Party**. The screen depicted below will appear.



The screenshot shows the ECF system interface. At the top, there is a blue header with the ECF logo on the left and the word "Civil" on the right. Below the header, the text "Search for a party" is displayed. Underneath, there is a label "Last/Business name" followed by a text input field. Below the input field are two buttons: "Search" and "Clear".

You must first perform a search to see if your party is already entered on the ECF system. Type the first few letters of the party's last name for an individual, or the first few letters of the company name. Click [**Search**].

If a match is found, ECF will display a list of party names. If the name of the party you represent appears in the list, click on it and then click [**Select name from list**]. Review the party information and select the party's role in this filing. Click [**Submit**].

If a match is not found, or your party does not appear in the list, click [**Create new party**].

ECF displays the following screen.

ECF Civil • Criminal • Query •

Party Information 2/9/2002

Last name First name

Middle name Generation Title

SSN Tax ID

Role Pro se

Office Address 1

Address 2 Address 3

City State Zip

County Country

Phone Fax

E-mail

Party text

Start date

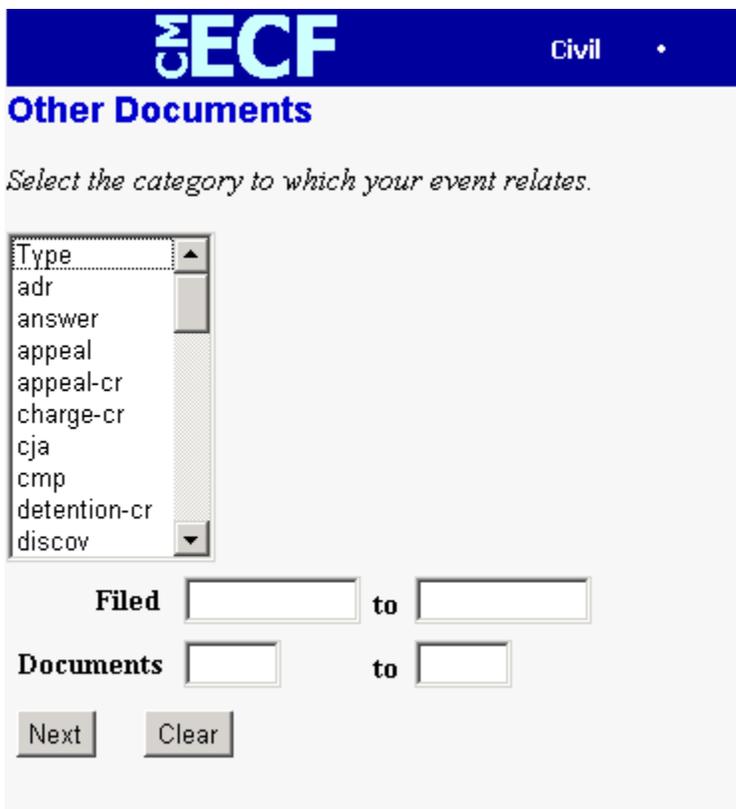
- For a company, enter the entire company name in the **Last Name** field. Choose the appropriate **Role** from the drop down list. Click [**Submit**].
- For an individual, fill out the **Last Name, First Name, Middle Name, Generation** and **Title** fields as appropriate. Choose the appropriate **Role** from the drop down list. Click [**Submit**].
- Leave all other fields blank.

Linking Documents (Refer to existing event)

Some pleadings such as Briefs and Indexes should be “linked” to their related documents in the case. When filing these and certain other types of documents you will be presented with the following screen.



An “event” in CM/ECF is anything that has been filed in a case. To link the document you are currently filing to a previously filed document, check the box in front of “**Refer to existing event(s)?**” and click [Next].



This screen requires that you filter the list of documents in the case by the type of document that you want to link to. The type list appears in alphabetical order. Document types in this list are the same as the types listed in the main filing menu. For example, to link to a Affidavit, you would choose the type “Oth_Doc” because Affidavit appears in

the “Other Documents” section of the main menu. You must choose a type on this screen. You also have the option of entering filed dates or document numbers if you would like to further narrow your search.

Once you select the type of document and click **[Next]** you are presented with a list of documents that match your search criteria. For this example we have selected Motion as the type.

CM/ECF Civil • Criminal • Query • R

Other Documents

Select the appropriate event(s) to which your event relates:

- 05/01/2002 [2](#) MOTION for Preliminary Injunction by Attorney guestaty on behalf of Defendant Bob Stoops (guestaty,)
- 05/01/2002 [3](#) MOTION for Extension of Time by Attorney guestaty on behalf of Defendant Bob Stoops (guestaty,)

Click the checkbox for the document you wish to link to and click **[Next]**.

Query Feature

Registered participants should use this feature to query the Electronic Case Filing (ECF) system for specific case information. To enter the Query mode, click on **Query** from the **Blue** menu bar of ECF.



ECF opens the **PACER Login** screen. You must enter your **PACER** login and password before ECF permits you to query the ECF database.

Note: Your PACER login and password are different from your ECF login and password. You must have a PACER account in order to retrieve, view, and print certain documents. You will be charged a fee of \$.08 per page to access documents, docket sheets, etc. from ECF.

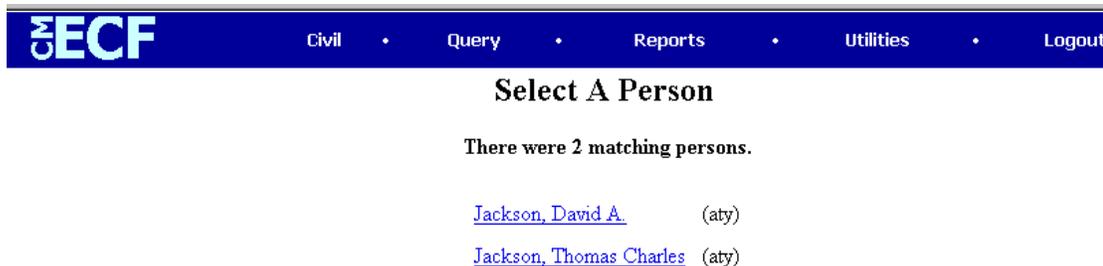
After you enter your PACER login and password, ECF opens a Query data entry screen as depicted below. If you know the number that the Court has assigned to the case, enter it in the **Case Number** field and click on the **[Run Query]** button. ECF opens the query screen depicted in Figure B on the next page.

The image shows the ECF 'Query' screen. At the top is a blue menu bar with the ECF logo and navigation links: 'Civil', 'Criminal', 'Query' (highlighted), 'Reports', 'Utilities', and 'Logout'. Below the menu bar, the word 'Query' is written in blue. The main area has a light yellow background and is titled 'Search Clues'. It contains several search fields: 'Case Number' with the value '00-101' and examples '(Examples: 99-500, 1:99cv500)', 'Def Number' (empty), 'Filed Date' (two empty date fields with 'to' between them), 'Last Entry Date' (two empty date fields with 'to' between them), 'Nature of Suit' (a dropdown menu showing '0 (zero)', '110 (Insurance)', and '120 (Contract Marine)'), 'Last Name' (empty) with examples '(Examples: Desoto, Des*t)', 'First Name' (empty), 'Middle Name' (empty), and 'Type' (a dropdown menu). At the bottom are two buttons: 'Run Query' and 'Clear'.

You may query the ECF database by the name of a party or an attorney to the case. Enter the last name of the party in the appropriate field. If more than one person with that name is in the database, ECF returns a screen from which to select the correct name (Figure A). If you click on the name of the party, ECF will open the query screen depicted in Figure B. If the individual is a party to more

than one case, ECF will open a screen listing all of the party's cases. Click on the case number hyperlink and ECF opens the query screen depicted in Figure B.

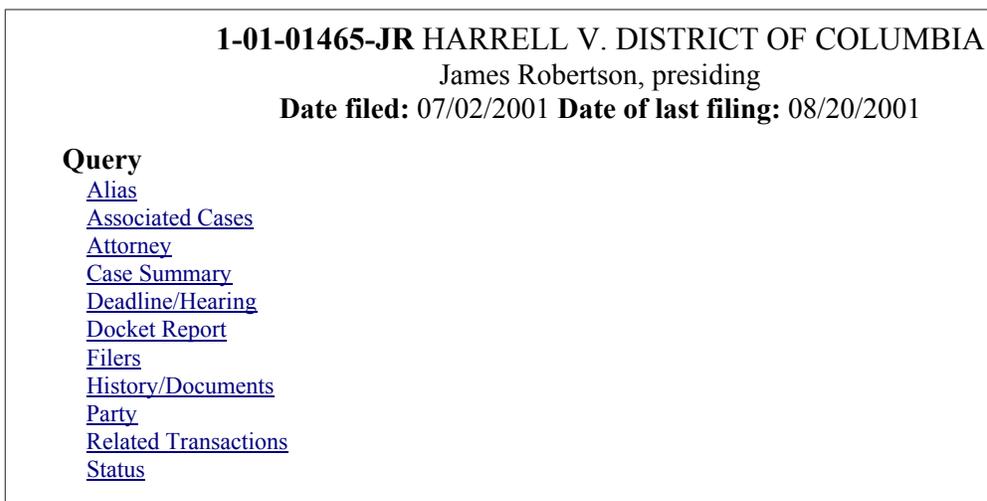
Figure A



After querying the database by case number, name, or nature of suit, ECF opens the **Query** window for the specific case you selected. See Figure B.

You may also query a case by the nature of suit. You must enter a range for either the filed date or the last entry date in order for the query to run. To search for all cases of a certain type, use the date 1/1/1970 as the "beginning of time." When you run the query, if there is more than one case that meet those criteria, you will get a screen similar to the one in Figure A, but listing multiple case numbers.

Figure B



At the top of the window, ECF displays the case number, parties to the case, presiding Judge, date that the initial claim was filed, and date of last filing for the case. You may choose specific case information from a large list of query options by clicking on the appropriate hyperlinked name on the screen. The following paragraphs describe several of the available case-specific query options.

Attorney

Displays the names, addresses, and telephone numbers of the attorneys who represent

each of the parties to the case.

Case Summary

Provides a summary of current case-specific information as represented below.

James Robertson, presiding			
Date filed: 07/02/2001 Date of last filing: 08/20/2001			
Case Summary			
Office:	Mobile, AL	Filed:	07/02/2001
Jury Demand:	Both	Demand:	
Nature of Suit:	442	Jurisdiction:	Federal Question
Cause:	28:1983 Civil Rights	Disposition:	
County:		Terminated:	
Origin:	1	Reopened:	
Lead Case:	None		
Related Case(s):	None		
Flags:	JURY, TYPE-H		
Party 1:	WAYNE HARRELL (pla)		
Party 2:	DISRTICT OF COLUMBIA (DFT)		
Atty: Ruth Ann Lowery	Represents Party 1: pla	Phone:	(202) 789-6064
		Fax:	(202) 789-6190
		E-mail:	rlowery@bdlaw.com
Atty: David A. Jackson	Represents Party 2: dft	Phone:	(202) 724-6618

Deadlines/Hearings

Produces a screen that allows you to query the database by various means to obtain hearing and other schedule deadlines. If you query as illustrated below, ECF opens the **Deadline/Hearings** screen depicted on the next page.

Deadlines/Hearings

Sort by

- Document Number
- Deadline/Hearing
- Filed
- Due/Set**
- Satisfied
- Terminated

After the window opens, if you click on a document number, ECF will display the actual Scheduling Order for the conference or hearing.

1-01-01465-JR HARRELL v. DISTRICT OF COLUMBIA

James Robertson, presiding

Date filed: 07/02/2001 Date of last filing: 08/20/2001

Deadlines/Hearings

Doc. No.	Deadline/Hearing	Event Filed	Due/Set	Satisfied	Terminated
7	Jury Trial	08/20/2001	07/08/2002 at 09:30 AM		
7	Final Pretrial Conference	08/20/2001	06/27/2002 at 04:30 PM		
7	Status Conference	08/20/2001	01/08/2002 at 04:30 PM		
	Meet & Confer Hearing	07/31/2001	08/08/2001 at 02:00 PM		08/08/2001
1	Answer due from DC	07/02/2001	07/23/2001	08/06/2001	

If you click on the button to the left of the Deadline/Hearing title, ECF will display the docket information and related docketing entries for the hearing that you selected.

Docket Report

When you select Docket Report, ECF opens the Docket Sheet screen as depicted below.

ECF Civil • Criminal

Docket Sheet

Case number

Filed to

Entered to

Documents to

Include terminated parties
 Include links to Notice of Electronic Filing
 Include Caption

Sort by

You may select a date range for your docketing report as well as a range of docketing numbers. If you leave the range fields blank, ECF will default to print the entire docketing report. Place a checkmark in the box to **Include links to Notice of Electronic Filing** if you

wish to view them from the docket sheet. After you have selected the parameters for your report, click on the **[Run Report]** button. ECF will run your custom docketing report and display it in a window as depicted.

The document numbers in the middle column of Figure 23B are hyperlinks to PDF files of the actual documents. Place your pointer on the button next to the document number and click to display the **Electronic Notification Report** for the document.

History/Documents

This selection queries the database for case event history and documents associated with the case. After you click on the **History/Documents** hyperlink, ECF opens the screen depicted in Figure 24. You may select the sort order for the query report and choose to exhibit all events or only those with documents attached. ECF also offers you the option to display the docket text in the report.

Figure 24

The screenshot shows the ECF web interface for the 'History/Documents' section. The top navigation bar includes 'Civil', 'Query', 'Reports', and 'Utilities'. The main content area has the title 'History/Documents' and three radio button options: 'All events (history)' (selected), 'Only events with documents', and 'Display docket text' (checked). Below these options is a 'Sort by' dropdown menu with 'Most recent date first' selected. At the bottom, there are 'Run Query' and 'Clear' buttons.

After making your selections, click on the **[Run Query]** button. ECF queries the database and builds your report. Figure 24A depicts a portion of a **History/Documents** report. This particular report lists all of the events and documents associated with the case in reverse chronological order. It also displays the docketing text for all docketed events.

Figure 24A

1-01-01465-JR HARRELL v. DISTRICT OF COLUMBIA
James Robertson, presiding
Date filed: 07/02/2001 Date of last filing: 08/20/2001

History

Doc. No.	Dates	Description	Private Event	Type Subtype	Docket Part ID
6	Filed: 08/20/2001 Entered: 08/20/2001	Meet and Confer Statement		misc mcstmtX	34
<i>Docket Text:</i> MEET AND CONFER STATEMENT. (Lowery, Ruth)					
7	Filed: 08/20/2001 Entered: 08/20/2001	Scheduling Order		order scho	36
<i>Docket Text:</i> SCHEDULING ORDER: Final pretrial conference set for 6/27/2002 at 4:30 PM; jury trial set for 7/8/2002 at 9:30 AM; status conference set for 1/8/2002 at 4:30 PM. Signed by Judge James Robertson on August 20, 2001. (MT,)					
7	Filed: 08/20/2001 Entered: 08/20/2001	Set Deadlines		order setddl	37
<i>Docket Text:</i> SCHEDULING ORDER: Final pretrial conference set for 6/27/2002 at 4:30 PM; jury trial set for 7/8/2002 at 9:30 AM; status conference set for 1/8/2002 at 4:30 PM. Signed by Judge James Robertson on August 20, 2001. (MT,)					
--	Filed: 08/08/2001 Entered: 08/08/2001	Meet and Confer Hearing		hearing mchrg	32
<i>Docket Text:</i> Minute Entry: Meet and Confer Hearing held on 8/8/2001 before Judge James Robertson in chambers. (Not reported) (mlp,)					
--	Filed: 07/31/2001 Entered: 07/31/2001	Calendar Entry		utility calentry	17
<i>Docket Text:</i> Calendar Entry, Set/Reset Hearings: Meet and Confer Hearing set for 8/8/2001 02:00 PM before Judge James Robertson in chambers. (mlp,)					
--	Filed: 07/31/2001	Set/Reset Hearings		utility	18

You may view a PDF file of actual documents by clicking on the document number in the far-left column of the onscreen report.

Other Queries

The process for selecting and running other queries in the **Query** feature of ECF is similar to what has been described above.

Reports Feature

The Reports feature of ECF provides the user with several report options. After selecting the Reports feature from the **Blue** menu bar, ECF opens the **Reports** screen depicted in Figure 25.

Figure 25

The screenshot shows the ECF interface with a blue menu bar containing 'Civil', 'Query', and 'Reports'. The 'Reports' menu item is circled in blue. Below the menu bar, the 'Reports' screen is displayed with three options: 'Calendar Events', 'Cases Filed', and 'Docket Sheet'. 'Cases Filed' and 'Docket Sheet' are circled in red.

If you select Cases Filed or Docket Sheet from the screen depicted in Figure 25, ECF will ask you to login to PACER. You may view Court Calendar Events for a case without logging into PACER.

Docket Sheet

Click on the **Docket Sheet** hyperlink in Figure 25 and ECF opens the **PACER** login screen.

Enter your **PACER** login and password. Click on the **[Login]** button and ECF will open the Docket Sheet report query window depicted below.

The screenshot shows the ECF Docket Sheet query window. At the top, there is a blue header with the ECF logo on the left, and 'Civil' and 'Criminal' tabs on the right. Below the header, the title 'Docket Sheet' is displayed. The main area contains several input fields and checkboxes. The 'Case number' field is filled with '99-700'. There are two radio buttons: 'Filed' (selected) and 'Entered'. The 'Entered' option has two empty text boxes separated by 'to'. Below this is a 'Documents' section with two empty text boxes separated by 'to'. There are three checkboxes: 'Include terminated parties' (checked), 'Include links to Notice of Electronic Filing' (unchecked), and 'Include Caption' (checked). A 'Sort by' dropdown menu is set to 'Oldest date first'. At the bottom, there are two buttons: 'Run Report' and 'Clear'.

This is the same query window that ECF displayed when you selected **Docket Report** from the **Query** feature (Page 29). Enter the case number for your docket sheet in the **Case Number** field. Select parameters for the remainder of the data entry fields and click on the **[Run Report]** button. ECF will display a full docket sheet for the case you selected. See the **Query** feature section of this manual for a depiction of a partial docket sheet report. If you do not need a complete docket sheet, you can narrow the query using the date filed/entered fields. ECF also offers various sorting options from the Docket Sheet query screen.

Civil Cases Report

The **Civil Cases** report provides you with the flexibility to query the ECF database to locate cases electronically filed within a specific date range, or by Nature of Suit and Cause Code. When you click on the **Civil Cases** hyperlink, ECF displays a query screen as depicted here.

Civil Cases Report

Office: 4 Lincoln, 7 North Platte
 Case type: Civil, Miscellaneous
 Nature of suit: 0 (zero), 110 (Insurance)
 Case flags: 2255MOTION, AOFORM
 Cause: 0 (No cause code entered), 02:0431 (02:431 Fed. Election...)
 Filed: 9/23/2002 to 10/23/2002
 Terminal digit(s): 2, 47
 Open cases
 Closed cases
 Sort by: Case Number
 Run Report Clear

Note: If you are not logged into PACER, ECF will display the PACER login screen. Login to PACER and ECF will open the **Civil Cases Report** screen.

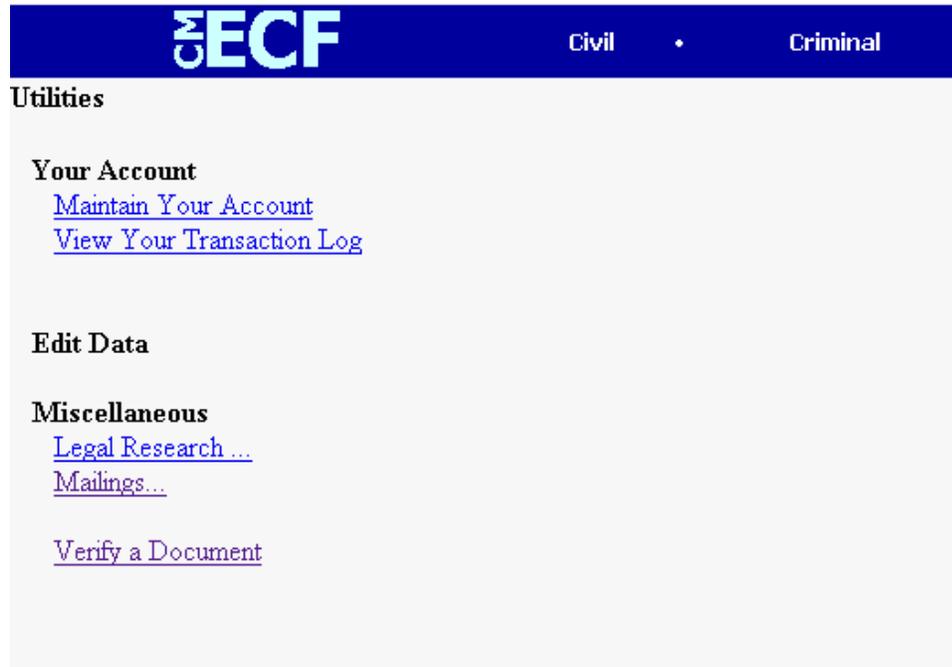
Enter the range of case filing dates for your report and select a Nature of Suit or Cause Code, if you wish to narrow your search. If you leave all fields blank, ECF will display a report for all cases opened in ECF. This picture depicts part of a report of all cases filed in ECF at the U.S. District Court from 9/23/2002 to 10/23/2002.

Civil Cases Report				
Version 1 -- U.S. District Court of Nebraska				
Filed Report Period: 09/23/2002 - 10/23/2002				
Case Number/ Title	Date Filed/ Reopened/ Added	Date Closed/ Reclosed	Days Pending	Notes
4:02-cv-03257 Anderson et al v. Gale	Filed: 09/23/2002		31	Cause: 28:1343 Violation of Civil Rights NOS: Civil Rights: Voting Office: 4 Lincoln President: Richard G. Kopf Referral: David L. Piester Jury demand: None
4:02-cv-03258 Lujan v. Kenney	Filed: 09/23/2002		31	Cause: 28:2254 Petition for Writ of Habeas Corpus (State) NOS: Habeas Corpus (General) Office: 4 Lincoln President: Lyle E. Strom Referral: Kathleen A. Jaudzemis Jury demand: None Case Flags: HABEAS
4:02-cv-03259 USA v. Woolley	Filed: 09/23/2002		31	Cause: 26:7401 IRS: Tax Liability NOS: Taxes Office: 4 Lincoln President: Richard G. Kopf Referral: David L. Piester Jury demand: None
4:02-cv-03260 Moore v. Lincoln	Filed: 09/24/2002		30	Cause: 42:2000e Job Discrimination (Employment) NOS: Civil Rights: Other Office: 4 Lincoln President: Warren K. Urborn Referral: David L. Piester Jury demand: Plaintiff

The far-left column of the Cases Filed report contains hyperlinked case numbers. If you click on a particular case number, ECF opens the **Docket Sheet** report window from which you can retrieve the docket sheet for the selected case. Follow the instructions in the previous section for a Docket Sheet report.

Utilities Feature

The **Utilities** feature provides the means for registered users to maintain their account in ECF and to view all of their ECF transactions.



The screenshot shows the ECF Utilities page. At the top is a dark blue header with the ECF logo on the left, and the words "Civil" and "Criminal" separated by a dot in the center. Below the header, the word "Utilities" is displayed. The page content is organized into three sections: "Your Account" with links for "Maintain Your Account" and "View Your Transaction Log"; "Edit Data"; and "Miscellaneous" with links for "Legal Research ...", "Mailings...", and "Verify a Document".

Your Account

This section of the **Utilities** feature provides you the capability to maintain certain aspects of your ECF account with the Court and to view a log of all your transactions within ECF.

Maintain Your Account

Click on the [Maintain Your Account](#) hyperlink to open the **Maintain User Account** information screen.

Maintain User Account			
Last name	<input type="text" value="wes"/>	First name	<input type="text"/>
Middle name	<input type="text"/>	Generation	<input type="text"/>
Title	<input type="text"/>	Type	crt
Office	<input type="text" value="Will E. Short"/>		
Address 1	<input type="text" value="Technical Writer"/>		
Address 2	<input type="text"/>		
Address 3	<input type="text" value="Room 2301"/>		
City	<input type="text"/>	State	<input type="text"/>
Country	<input type="text"/>	County	<input type="text"/>
Phone	<input type="text" value="(202) 354-3297"/>	Fax	<input type="text"/>
Bar Id		Bar status	
Initials	DOB	AO code	End date
<input type="button" value="Email information..."/>		<input type="button" value="More user information..."/>	
<input type="button" value="Submit"/>	<input type="button" value="Clear"/>		

This screen displays all of the registration information that is contained within the ECF database for your account with the Court. This includes Bar Identification and Bar status. **YOU WILL BE RESPONSIBLE FOR CHANGING YOUR PHYSICAL ADDRESS WHEN NECESSARY.**

Clicking on the [E-mail information] button opens the following screen.

E-mail information for wes

Primary e-mail address

Send the notices specified below

to my primary e-mail address

to these additional addresses

Send notices in cases in which I am involved

Send notices in these additional cases

Send a notice for each filing

Send a Daily Summary Report

Format notices html format for Netscape or ISP e-mail service

text format for cc:Mail, GroupWise, other e-mail service

ECF will E-mail to parties their **Notices of Electronic Filing** based upon the information entered in this screen. Perform the following steps to enter additional e-mail addresses for individuals that you wish ECF to notify regarding new case pleadings and documents.

- From the screen depicted in Figure 31A, enter a check mark by clicking on the box to the left of the line, which reads “**to these additional addresses**”.
- Enter the e-mail addresses of those individuals you wish to notify concerning ECF activity. This data entry field has a capacity of 250 characters.

E-mail information for wes

Primary e-mail address

Send the notices specified below

to my primary e-mail address

to these additional addresses

Send notices in cases in which I am involved

Send notices in these additional cases

Send a notice for each filing

Send a Daily Summary Report

Format notices html format for Netscape or ISP e-mail service

text format for cc:Mail, GroupWise, other e-mail service

- Stipulate the format of the ECF notices by selecting your choice from the bottom of the screen.
- If you wish to enter completely new information about your account, use the **[Clear]** button to clear the fields on this screen.

After updating your account information, click on the **[Return to Account screen]** button to return to your **Maintain User Account** screen (Figure 30).

To edit or view login information about your account, select the button labeled **More user information**, from the **Maintain User Account** screen. ECF opens the screen depicted in Figure 32.

Figure 32

More User Information for wes			
Login	shortw	Last login	08-31-2001 11:03
Password	*****	Current login	09-04-2001 11:03
Prid	2231	Create date	08/02/2001
Registered	Y	Update date	08/16/2001
Groups	Quality Control		
Return to Account screen		Clear	

This screen displays user login information and provides the means to change your ECF password. Notice that ECF displays a string of asterisks in the **Password** field.

To change your ECF password, place your cursor in the **Password** field and delete the asterisks. Type in your new password. ECF displays the actual characters of your new password as you type. When you have completed your interface with ECF from this screen, click on the **[Return to Account screen]** button to reopen the **Maintain User Account** screen. When you are satisfied that all of your account information is accurate and up-to-date, click on the **[Submit]** button at the bottom of the **Maintain User Account** screen to submit your changes to ECF. ECF will notify you onscreen that your updates were accepted. If you changed passwords, you may begin using the new password during your next ECF session.

View Your Transaction Log

From the **Utilities** screen, click on the **[View your Transaction Log]** button. ECF opens a screen with two fields for entering the Date Selection Criteria for a Transaction Log Report. Enter the date range for your report and click on the **[Submit]** button. ECF displays a report of all your transactions in ECF within the date range you specified for Date Selection Criteria. See Figure 33 for a sample transaction log report.

Figure 33

Transaction Log			
Report Period: 08/16/2001 - 09/04/2001			
Id	Date	Case Number	Text
3212	08/22/2001 15:45:54	01-4011	First MOTION for Permanent Injunction by ARLENE ACKERMAN. Responses due by 9/4/2001. Replies due by 9/11/2001. (Attachments: # (1) Exhibit Test Document)(wes,)
3326	08/27/2001 11:44:12	01-4011	First MOTION for Preliminary Injunction by ARLENE ACKERMAN. Responses due by 8/30/2001. Replies due by 8/30/2001. (wes,)
3330	08/27/2001 12:01:51	01-4011	RESPONSE in Opposition re [2] filed by DE'MITRIA RICE. (wes,)
3331	08/27/2001 12:05:13	01-4011	ORDER temporarily granting Motion for Preliminary Injunction [2]. Motion referred to fhsakif. Signed by Judge sullivan emmett g on 08/28/01. (wes,)
3335	08/27/2001 14:23:52	01-4011	RESPONSE to Motion re [2] <i>Preliminary Injunction</i> filed by DE'MITRIA RICE. (Attachments: # (1) Exhibit Exhibits are being held in the Clerk's office in paper format)(wes,)
3336	08/27/2001 14:30:43	01-4011	RESPONSE to Motion re [1] <i>Permanent Injunction</i> filed by ARLENE ACKERMAN. (Attachments: # (1) Exhibit exhibits are being held in the Clerk's office in paper)(wes,)
3337	08/27/2001 15:49:55	01-4011	Second MOTION for Preliminary Injunction by <i>plaintiff for defendent to cease and desist the assignment of plaintiff to cafeteria duty</i> by ARLENE ACKERMAN. Responses due by 8/31/2001. Replies due by 8/31/2001. (wes,)
3338	08/27/2001 16:18:42	01-4011	MOTION for Preliminary Injunction to <i>cease and desist from assigning plaintiff to work as a cafeteria monitor</i> by DE'MITRIA RICE. Responses due by 8/31/2001. Replies due by 8/31/2001. (wes,)
3339	08/28/2001 10:19:15	01-4011	Second MOTION for Preliminary Injunction to <i>cease and desist the assignment of plaintiff to cafeteria monitor</i> by DE'MITRIA RICE. Responses due by 9/10/2001. Replies due by 9/14/2001. (wes,)
3431	09/04/2001 14:21:26		Updated person record: wes Prid: 2231
3431	09/04/2001 14:21:27		Updated user record: shortw 2231
Total Number of Transactions: 11			

Use this feature of ECF to review your transactions and to verify that:

- all of the transactions you entered are reflected in the Transaction Log
- no unauthorized individuals have entered transactions into ECF using your login name and password.

Miscellaneous

ECF provides three **Miscellaneous** functions within the Utilities feature of the system.

- Legal Research
- Mailings
- Verify a Document

When you click on the **Legal Research** hyperlink from the **Miscellaneous** screen, ECF opens a new screen that contains hyperlinks to a Law Dictionary, a Medical Dictionary, and Westlaw via the Internet. Select the **Verify a Document** hyperlink to open a query screen and enter data in the screen fields to locate a particular document attached to a specific case number. There is also a **Mailings** hyperlink that opens a new screen for making or requesting mailings from ECF.

Logout

After you have completed all of your transactions for a particular session in ECF, you should exit from the system.



Click on the **Logout** hyperlink from the ECF **Blue** menu bar. ECF will log you out of the system and return you to the ECF login screen as depicted in Figure 4 of this manual.

Additional Information Regarding ECF

Sealed Documents

Continue to file sealed documents at the District Court Clerk's office in accordance with the existing practices and procedures for conventional filing.